

# ASPEN • LEADERSHIP • GROUP

EXECUTIVE DIRECTOR OF PRINCIPAL AND PLANNED GIFTS  
ROCHESTER INSTITUTE OF TECHNOLOGY

Rochester, New York

<http://rit.edu>



The Aspen Leadership Group is proud to partner with Rochester Institute of Technology (RIT) in the search for an Executive Director of Principal and Planned Gifts.

The Executive Director of Principal and Planned Gifts leads a team of directors and senior directors in engaging donors and building relationships that lead to securing significant philanthropic gifts for the university. These donors have the capacity to make gifts of \$1 million or more and/or make deferred gifts through bequests, charitable gift annuities, lead trusts, and other deferred gift methods. The Executive Director reports to the Associate Vice President for University Development and Engagement and is a member of the department's leadership team as well as a member of the 100-person team that makes up the Division of Development and Alumni Relations.

Through a unique blend of curricular, experiential, and research programs delivered within a student-centric culture, Rochester Institute of Technology prepares its students for successful careers in a global society. Founded in 1829, Rochester Institute of Technology is a privately endowed, coeducational university with nine colleges emphasizing career education and experiential learning. The campus occupies 1,300 acres in suburban Rochester, the third-largest city in New York State. RIT also has international locations in China, Croatia, Dubai, and Kosovo. The RIT student body consists of approximately 15,400 undergraduate and 3,250 graduate students. Enrolled students represent all 50 states and more than 100 countries. Nearly 3,300 students from diverse racial and ethnic backgrounds are enrolled on the main campus along with more than 2,700 international students. An additional 1,930 students are enrolled at RIT's international locations. RIT alumni number nearly 125,000 worldwide. RIT is an internationally recognized leader in preparing deaf and hard-of-hearing students for successful careers in professional and technical fields. The university provides unparalleled access and support services for the more than 1,100 deaf and hard-of-hearing students who live, study, and work with hearing students on the RIT campus.

There's more to life than classes, exams, and projects at RIT. RIT is alive with energy and spirit—from top Division I men's and women's hockey teams to more than 145 clubs, organizations, and festivals including the *Imagine RIT: Innovation and Creativity Festival*, a campus-wide event that showcases the innovative and creative spirit of RIT students, faculty, and staff to over 30,000 visitors annually. Held each spring, *Imagine RIT* is the kickoff to Rochester's rich festival season.

Given the distinctiveness of its origins, it should come as no surprise that in this second decade of the 21st century, RIT has kept pace with the relentless acceleration of scientific and technological discovery and the resulting economic, social, and cultural transformations. One of the nation's premier universities for art, design, film, photography, and crafts, the College of Imaging Arts and Sciences provides a range of innovative programs and a panoramic perspective that can be found nowhere else. One hundred and eighty-six years after its founding, RIT has matured into one of the world's most innovative, agile, and foresighted universities.

## **REPORTING RELATIONSHIPS**

The Executive Director of Principal and Planned Gifts will report to the Associate Vice President for University Development and Engagement.

## **PRINCIPAL OPPORTUNITIES**

RIT is internationally recognized for research, innovation, and academic leadership. It is home to over 18,000 full and part-time students in more than 200 career-oriented and professional programs and has a worldwide alumni network of 125,000 alumni.

On July 1, 2017, RIT welcomed David C. Munson Jr. as its 10<sup>th</sup> president. The university's new leadership follows with RIT's national Carnegie Classification change to "Doctoral University" reflecting RIT's growth in its Ph.D. degrees. To further show RIT's promising future, it is experiencing increasing enrollment; ascending national rankings; and an expanding global presence.

Philanthropically, RIT is seeing historically high levels of private support with a 5-year annual giving average of well over \$39 million. The Planned Giving staff is averaging over \$7 million annually and is helping to grow RIT's endowment to an all-time high between \$745-\$760 million. With a staff of 100 people across nine colleges and two administrative areas, RIT's Development and Alumni Relations Division is poised to make an even greater impact upon the campus and the university's future. There are more than 3,000 prospects under active management by the leadership giving, major giving, and principal and planned giving teams. Four primary metrics (qualifications, visits, asks, and individual fundraising goals) continuously drive a productive and collaborative environment where all fundraisers are given the tools to succeed.

RIT is now in the silent phase of a \$700 million comprehensive campaign that will extend the university's prominence and bring it to the next level. Fundraising goals for the campaign span the following areas:

- Career Education and Student Success
- The Student-Centered Research University
- Signature Research Initiatives
- Leveraging Diversity

RIT's trajectory, new leadership, and current giving environment demonstrate that RIT is embarking upon one of its most promising periods in recent history. Joining RIT's team now is a wonderful opportunity for someone looking to grow professionally and to work in a continuously stimulating environment.

## **PRIMARY RESPONSIBILITIES**

The Executive Director of Principal and Planned Gifts will

- work collaboratively with the President, Vice President for Development and Alumni Relations, and other administrative leaders to build and sustain relationships that lead to transformational gifts to the university which match donors' interests to the priorities of the university;
- oversee all strategies directed toward principal and planned gift activities for the university including donor identification, cultivation, solicitation, and stewardship ensuring that donors of this level are engaged across all appropriate aspects of the life of the university;

- carry a portfolio of 75 prospects with the capacity to make gifts of \$1 million or more or planned gifts and actively participate in the solicitation, negotiation, and stewardships of gifts at this level;
- manage a team of directors and senior directors with similar principal and planned giving portfolios and responsibilities raising upwards of \$17 million annually;
- serve as the primary liaison to the university's development directors educating and assisting the directors in advancing their principal and planned giving efforts and knowledge base;
- design strategies to ensure that major gifts (\$50,000-\$1 million) to the university have the potential to move up the pipeline to the principal gift level and have the greatest opportunity for including a planned giving component;
- participate in strategic planning with the Associate Vice President for University Development and Engagement and her leadership team to develop meaningful giving programs that fulfill the university's annual and campaign fundraising goals;
- serve on university-wide committees;
- engage in budget management and forecasting; and
- adhere to the university's compliance and internal control guidelines.

#### KEY COLLEAGUES



##### **Lisa Cauda, Ed.D., Vice President, Development and Alumni Relations**

Dr. Cauda has been with RIT since 2001 and has served as Vice President since 2006. Over her 16 plus years, the division has grown from a team of 40 to 100. In 2006, she led the university to the completion of "Powered by the Future," a comprehensive campaign that raised \$300 million. RIT is currently in the quiet phase of a comprehensive campaign where RIT hopes to raise a minimum of \$700 million through philanthropic, research, and public funds.



##### **Heather Engel, Associate Vice President for University Development and Engagement**

Heather Engel joined RIT in 2004 as the Assistant Vice President of Planned Giving. In 2014, she became Associate Vice President, Campaigns and Constituent Development with supervisory responsibilities for the departments of Principal Gifts, Campaign Management, and Prospect Research/Management. In September 2017, Engel added the management of the university's major gift officers and planned giving to her current role. She is a member of the Board of Trustees' Development Committee along with Dr. Cauda, and is the liaison to the BOT Research and Graduate Programs Committee.



##### **Hallett Burrall, Senior Director of Planned Gifts**

Hal Burrall has been at RIT since November 2015. He was hired as Director of Planned Giving and became Senior Director in January 2016. Prior to joining RIT, Burrall held fundraising positions at Wells College and has five plus years as a professional fundraiser along with ten plus years in volunteer fundraising roles. He is a member of the Planned Giving Council of Upstate NY. In fiscal year 2017, Burrall helped to close \$9 million in bequests and deferred gifts for RIT.



##### **Mark Boylan, Senior Director of Principal Gifts**

Mark Boylan joined RIT in August 2001, and currently is RIT's longest-tenured fundraiser with 16 years in a consecutive fundraising role. He has served as the Director of Development for the Saunders College of Business and in 2014 became Senior Director for Principal Gifts. Boylan played a lead role in securing a \$5 million challenge gift for the Saunders College of Business.



**Mark Gaul, Senior Director of Development**

Mark Gaul has been with RIT since 2002 primarily in a college-based Director of Development role. He has been assigned to colleges, as well as specialized areas such as the Munsell Color Science Laboratory and Imaging Sciences. Gaul has proven his collaborative strengths by working closely with deans, department heads, and the corporate and foundations team to close numerous individual, corporate, and foundation gifts which most recently included an Emerson Foundation match. His productivity and responsibilities most closely resemble RIT's typical fundraiser.



**Sharon Lonthair, Managing Director, Development and Alumni Relations**

Sharon Lonthair has been with RIT since 2001, and is a member of the division's leadership team. She leads the department responsible for the division's operational activities. This includes staff recruiting and retention; budget; compliance; national reporting; and university assessment. She is also responsible for the division's gift acceptance and naming policies.



**Nancy Bears, Development Assistant, University Development and Engagement**

Nancy Bears has been in the division since 2009 and during that time has supported the Corporate and Foundation Relations fundraising team. Bears recently moved to support the Principal and Planned Giving efforts of the advancement team. With her experience in Corporate and Foundation Relations she is constantly building meaningful relationships with faculty and program directors in support of her team's efforts.

**CANDIDATE QUALIFICATIONS AND QUALITIES**

The successful candidate for the position of Executive Director of Principal and Planned Gifts should have

- broad knowledge of fundraising and campaign principles including all planned giving vehicles;
- proven experience leading, inspiring, and motivating teams in a fast-paced, highly productive, relationship-based environment;
- excellent organizational, interpersonal, oral, and written communication skills;
- willingness to apply strategic and creative thinking which propels giving programs to the next level;
- ability to work both independently and collaboratively, internally and externally;
- ability to build long-term relationships with senior university leaders as well as university boards, volunteers, and donors;
- ability to manage multiple projects, take initiative, and coordinate follow-up;
- high degree of computer literacy, including such applications as Microsoft Suite, CRM applications, and internet navigation; and
- willingness to travel regionally and nationally.

A bachelor's degree is required for this position as is 7-10 years of proven experience in principal and/or planned giving programs.

## **SALARY & BENEFITS**

Members of the RIT community receive a well-balanced benefits package that offers a variety of choices and access to additional employment advantages. These benefits, combined with one's pay, provide a total compensation package that can be tailored to meet one's needs.

## **LOCATION**

The RIT campus is about six miles from downtown Rochester, NY. Rochester was rated sixth overall in the "best places to live" category by Places Rated Almanac. The Genesee River cuts through the center of the city, where it tumbles 96 feet straight down at High Falls before continuing on to Lake Ontario, easternmost of North America's Great Lakes. The greater Rochester area is home to more than one million people, making it the third-largest metropolitan area in New York State.

High-tech, communications, optics, research, and manufacturing companies, including many Fortune 500 companies, choose Rochester as their base of operations. The city has more than 4,000 exporting companies. Bausch & Lomb, Inc., Paychex Inc., Frontier Corp., Eastman Kodak Co., and other national and international firms make Rochester a great place to learn about the world of business.

Throughout Rochester one will find tree-lined streets; historic architecture; summer festivals; and plenty of shopping, dining, and entertainment options. Some of the flavor of Rochester can also be experienced in the nearby villages and towns, many of which are located on the historic Erie Canal. Nature lovers will find parks, beaches, mountains, gorges, lakes, and streams that provide year-round outdoor recreation and sightseeing.

## **DIVERSITY AND INCLUSION**

Rochester Institute of Technology, through its policies and practices, is responsible for building an inclusive environment where membership in the community allows for faculty, staff, and students to reach their fullest potential, both professionally and personally. RIT is committed to the development, administration, and interpretation of policies and procedures in a way that is consistent with its commitment to diversity and is in compliance with federal, state, and local laws. RIT's policies and procedures are administered in a way that supports fair treatment for all faculty, staff, students, and the RIT community at large.

RIT does not discriminate. RIT is an equal opportunity employer that promotes and values diversity, pluralism, and inclusion. For more information or inquiries, please visit <http://www.rit.edu/fa/humanresources/> or the U.S. Department of Education at [ED.Gov](http://ED.Gov).

## **APPLICATION DEADLINE**

All applications must be accompanied by a cover letter and résumé. Before submitting your materials, please read them over for accuracy. Review of applications will begin immediately and continue until the successful candidate has been selected.

*To nominate a candidate, please contact Angelique Grant: [angelique@aspenleadershipgroup.com](mailto:angelique@aspenleadershipgroup.com).*

RIT provides reasonable accommodations to applicants with disabilities under the Rehabilitation Act, the Americans with Disabilities Act, the New York Human Rights Law, or similar applicable law. If you need reasonable accommodation for any part of the application and hiring process, and you wish to discuss potential accommodations related to your application for employment at RIT, please contact [angelique@aspenleadershipgroup.com](mailto:angelique@aspenleadershipgroup.com).

*All inquiries will be held in confidence.*

## **ASPEN • LEADERSHIP • GROUP**

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